

SURRENDER REQUEST FORM

(सरेंडर रिक्वेस्ट फॉर्म)

Form No. (फॉर्म नंबर): **S U R 0 1** **03 21**

3 REASONS WHY YOU SHOULD CONTINUE WITH YOUR POLICY



This is a chance to grow investments



New policy will cost more



Benefits of staying invested that are available on plan



PLEASE DISCUSS WITH COMPANY REPRESENTATIVE BEFORE MAKING A DECISION

Form to be filled in **BLOCK LETTERS** only. (केवल ब्लॉक पत्रों में भरा जाना है)

Policy No. (पॉलिसी नंबर):

(10-digit number starting with C or U) {C या U से शुरू होने वाला 10 अंकों का नंबर}

PAN (पैन):

eIA No. (इआयए नंबर):

Name of Policy Owner/Assignee (पॉलिसी ओनर/असाइनी का नाम):

Mobile No.:

Alternate Mobile No.:

Email (ईमेल आईडी):

Recent Colour
Photograph of
Policy Owner/
Assignee
is mandatory

The mentioned contact number will be considered as consent to communicate with you. All communications will be sent through electronic medium on the email ID provided.

1. RESIDENCY DECLARATION (To be filled in case of change in tax residency status) रेजिडेंसी घोषणा (टैक्स रेजिडेंसी स्थिति में बदलाव के समय भरा जाना है)

Are you a Non-Resident Indian? Yes No (If Yes, fill the FATCA/CRS- Self Certification form)

a. My resident status is NRI since b. My current country of residence is

2. DOCUMENTS REQUIRED (आवश्यक दस्तावेज़):

Original Policy Document Photo Identity Proof Address Proof PAN copy

Signed and Personalised Cheque (If Non-Personalized – self attested Bank Statement/Passbook required). Only if NEFT is not registered already

3. REASON FOR SURRENDER (समर्पण का कारण)

We regret your decision and hope you have evaluated all the benefits of continuing with your policy prior to submitting this request.

Reason for surrender:

Repayment of existing loans Marriage/ Education Purchase of real estate

Reinvest in other financial instruments Others, please specify

4. Bank Account Details: National Electronic Fund Transfer (NEFT) in case NEFT details are not provided

बैंक खाता जानकारी – नैशनल इलेक्ट्रॉनिक फंड्स ट्रांसफर (एनईएफटी) यदि एनईएफटी विवरण उपलब्ध नहीं

Bank Account Holder Name:

Bank Name:

Bank A/C No.: IFSC:

Account Type: Savings Current NRO NRE* (*For NRE account, additional documents may be called as required by the taxation laws in force)

Account holders name should match with Policy Owner name.

Please provide self-attested personalised cancelled cheque or self-attested non-personalised cheque along with Bank Statement/Passbook.

Customer Acknowledgement Copy (Surrender Request Form)

Policy No.:

Date:

Service Request No.:

NAV: Before 3 PM After 3 PM

Approx. Surrender Value.(Rs.)

Received by Employee Name & Signature:

Stamp

Date & Time:
Branch Code:

5. Authorization (प्राधिकरण)

I authorize TATA AIA Life Insurance Company to credit the policy payout to the bank account provided and understand the information may be shared with third parties for compliance with any legal or regulatory requirements. I declare the details given are correct and complete. If the transaction is delayed or not effected for the reasons of incomplete or incorrect information provided above, Tata AIA Life Insurance Company would not be held responsible.

Signature of Policy Owner

DATE:

PLACE:

6. Declaration if signature of Policy Owner is in vernacular language (घोषणा यदि पॉलिसी ओनर का हस्ताक्षर शाब्दिक भाषा में हो तो):

Declarant to be 18 years or above and should be a person, other than the beneficiary of this policy.

I, _____ declare that the contents of the form have been explained to the Policy Owner in _____ language and form has been signed/ thumb impression affixed after fully understanding the content.

Signature of Declarant

Date:

Mobile No.:

Place:

FOR OFFICE USE ONLY केवल कार्यालय उपयोग के लिए:

Request submitted by: Policy Owner Advisor/ Relationship Manager Courier
 Third Party (Please specify Name and relation to Life Assured/Policy Owner) _____

Reason for Surrender: _____

Employee Name, Code and Signature: _____

Stamp of Branch Name, Date and Time: _____

Important Guidelines: Not to be printed महत्वपूर्ण दिशानिर्देश: प्रिंट न करें:

1. If the policy is assigned, assignee should sign and submit the request. If policy is under the provisions of MWP Act, the policy Owner can submit the request however the eligible surrender value will be credited into the nominee account selected in the policy under the MWP Act.
2. For Unit-Linked Products:
 - a) The surrender value depends on NAV as on the date the policy is surrendered. As per IRDAI regulation if request is received up to 3:00 pm IST the NAV of the same working day will be applicable. If the request is received on Saturday, Sunday, Public Holiday (As prescribed by the govt) or after 3.00 pm, next declared NAV will be applicable
 - b) The actual surrender value may differ as the surrender value depends on NAV as on the date the policy is surrendered
3. For Non-Unit Linked Products: The surrender pay out amount will be calculated after the deduction of automatic premium loan /Policy loan and interest applied (as applicable)
4. The policy will get terminated and the payment of the surrender value will discharge the Company of all its liabilities
5. Section 10 (D) will be applicable as per existing tax norms and TDS will be deducted from the payout value if valid PAN is not submitted

#RakshakaranHero

IN UNIT LINKED POLICY, MARKET RISK INVESTMENT PORTFOLIO IS BORNE BY THE POLICYOWNER.

Tata AIA Life Insurance Company Limited (IRDAI Regn. No.110) CIN: U66010MH2000PLC128403. **Registered & Corporate Office:** 14th Floor, Tower A, Peninsula Business Park, Senapati Bapat Marg, Lower Parel, Mumbai - 400013. Trade logo displayed above belongs to Tata Sons Ltd and AIA Group Ltd, and is used by Tata AIA Life Insurance Company Ltd under a license. For any information including cancellation, claims and complaints, please contact our Insurance Advisor / Intermediary or visit Tata AIA Life's nearest branch office or call 1-860-266-9966 or write to us at customercare@tataaia.com. Visit us at: www.tataaia.com. L&C/Misc/2022/Apr/0120

BWARE OF SPURIOUS PHONE CALLS AND FICTITIOUS / FRAUDULENT OFFERS

IRDAI is not involved in activities like selling insurance policies, announcing bonus or investment of premiums. Public receiving such phone calls are requested to lodge a police complaint

Contact us

 www.tataaia.com

 Chat on WhatsApp (7045669966) & Website

 Call us on 18602669966 - 24X7 Interactive Voice Response (IVR) [Customer Service Executive available from 10am to 7pm, Mon-Sat]

 SMS HELP to 5676799

 customercare@tataaia.com

 **Customer Service Department:** 9th Floor, Tower B, I- Think Lodha Techno Campus, Off Pokharan Road Number 2, Thane (West) - 400604.